



Perceptive Checklist Capture

Checklist Capture automates the process of gathering related documents and data from mobile, web and MFP devices. It marks off a checklist as each document is captured into the designated folder, lets users track a folder status throughout the process, and provides notification when a document is missing or incomplete. It also delivers information directly to your core business system while storing the document in a central repository for speedy retrieval. The results promote a more streamlined and efficient process, enhancing your ability to focus on customers and meet compliance requirements.

The problem

- ▶ **Inefficient processes:** Knowledge workers spend a great deal of time on tasks to capture, classify and store documents—time that could be better spent improving outcomes.
- ▶ **Delayed deficiency feedback:** Knowledge workers must manually identify missing or incomplete documents, creating roadblocks and extending the cycle.
- ▶ **Increased errors:** Knowledge workers, particularly those with heavy workloads, are prone to misfiling or misclassifying content with manual, labor-intensive processes.
- ▶ **Lack of standardized document handling:** Documents come from many sources and require multiple steps to gather content into a centralized location. Documents also frequently don't reach their final destination, requiring workers to track them down.
- ▶ **Security and compliance risks:** The pains of meeting compliance regulations and enforcing standardized processes reduce efficiencies and can lead to expensive fees. Additionally, classified information found on paper documents and unsecured electronic documents are at greater risk for disclosure.

Benefits

- ▶ **Streamline the capture and classification process:** Knowledge workers spend less time gathering supporting content and can focus on value-added tasks such as helping customers and decision making. The rate of misfiled and misclassified content is also minimized as automation takes care of manual processing steps.

- ▶ **Capture content that core systems don't address:** Gather relevant data from multiple internal and external sources, and standardize the indexing structure before storing content in a centralized repository.
- ▶ **Simplify deployment and expansion:** A central configuration is leveraged for every solution and for every type of device, such as mobile and MFP, simplifying the initial deployment and future expansion into other departments.
- ▶ **Complement existing core systems:** Checklist Capture and the solutions that leverage it work side-by-side with your core business systems already in place.
- ▶ **Easily show compliance:** Knowledge workers no longer submit folders without required documentation, freeing auditors from evaluating a manual processing trail.

Features

Capture on the go or in the office

- ▶ Capture content with a mobile device—such as a phone or tablet—a desktop computer or laptop, or an integrated Lexmark smart MFP
- ▶ Enjoy a consistent and unified experience across all devices and platforms

Checklist for folder completion status

- ▶ Access the checklist from all supported devices at any time, with a visual indicator of required documents and document deficiencies
- ▶ Add new content with a single click from the list of missing document types
- ▶ View existing documents and their properties, with the ability to add pages to documents already received

Centralized configuration

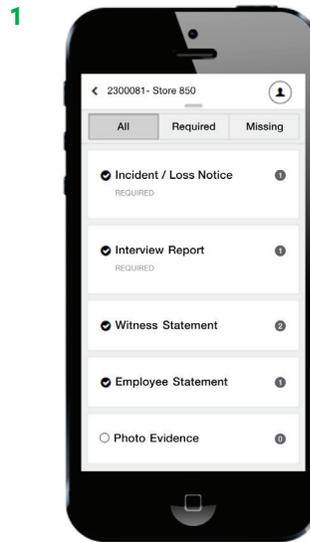
- ▶ A single location for all configuration options and solutions, no matter the types of devices leveraged
- ▶ The formalized user interface is easy for you to maintain and easy for Lexmark to support

Checklist Capture in action

A variety of industries and use cases benefit from automatically gathering related documents and data together. Checklist Capture makes this process quick and easy from mobile, web and MFP devices.

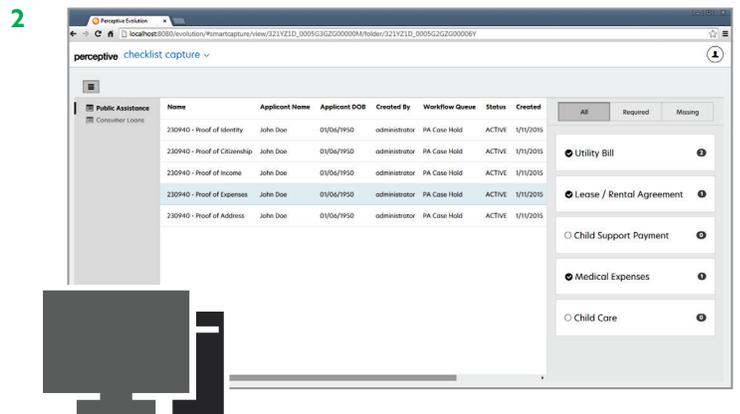
1. Mobile device

As a **loss prevention agent** for a large retail organization, Michael uses Checklist Capture on his phone to investigate store property damage. At the store, he launches the app on his phone and selects the case folder that was automatically created when the incident was reported. He is presented with a checklist of content related to the case and notes that the only item missing is photo evidence. He takes a picture of the damage and Checklist Capture automatically adds the photo and metadata to the folder. Next, the folder is automatically routed to the processor for review.



2. Desktop computer

Ashley, a **public assistance case worker**, uses Checklist Capture at her office computer to easily capture proof of citizenship, benefit forms, and many other types of documents to help constituents get the state-sponsored support they need. Today she needs to capture photos from a recent home visit and add them to the constituent's case. She connects her digital camera to her computer, downloads the photos and then drags the files into the existing folder. Checklist Capture automatically saves the files with the correct metadata and presents Ashley with a checklist that indicates no additional documentation is required at this time.



3. MFP

Mandy is a **loan officer** at a local branch bank. As part of the loan approval process, she enters information in the core loan application and clicks to create an empty folder that's indexed based on the loan record. At the Lexmark smart MFP, Mandy badges in, selects the folder that was created earlier, and then scans the required documentation. On the MFP touch screen, Checklist Capture presents Mandy with a checklist that indicates she needs to collect a Proof of Income document before the loan can be processed.

